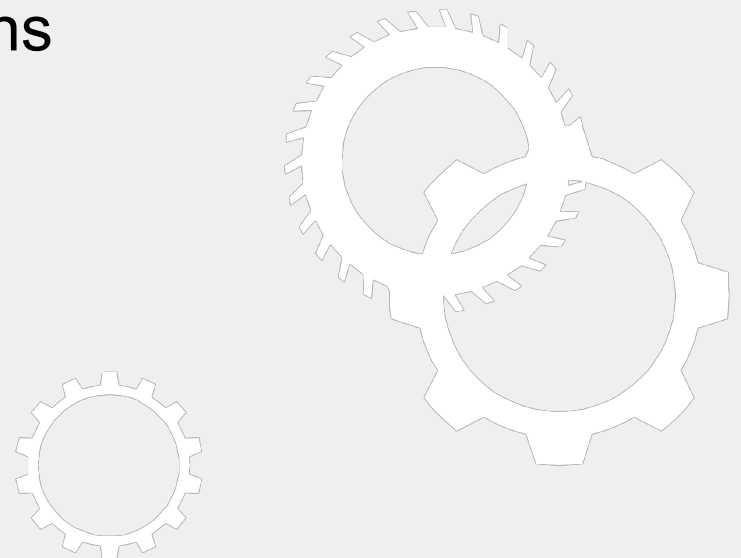# Grantmaking and Programs Quarterly Review

Evaluation & Learning Strategy
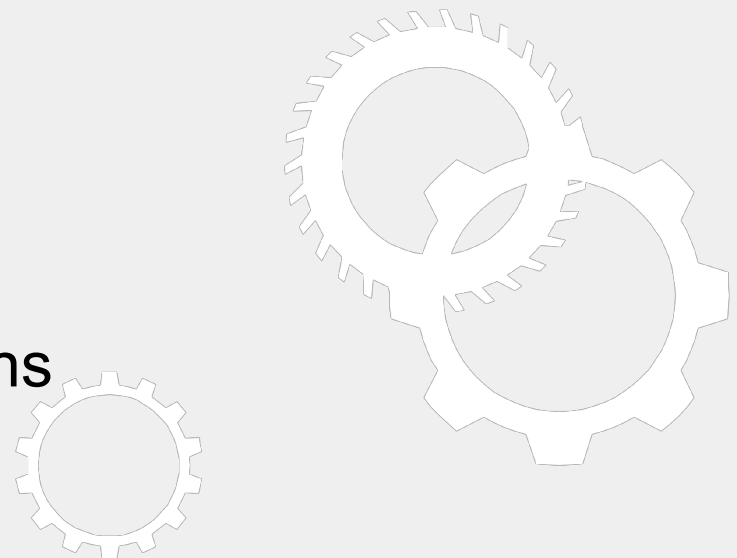October 24, 2013

Agenda

- Q1 Grantmaking Overview

- Evaluation & Learning Strategy

- Resources Needed and Questions

Agenda

- Q1 Grantmaking Overview
  - Overall progress
  - Strategic Questions
  - Annual Plans, Project and Event, Individual Engagement, Travel & Participation Support

- Evaluation & Learning Strategy
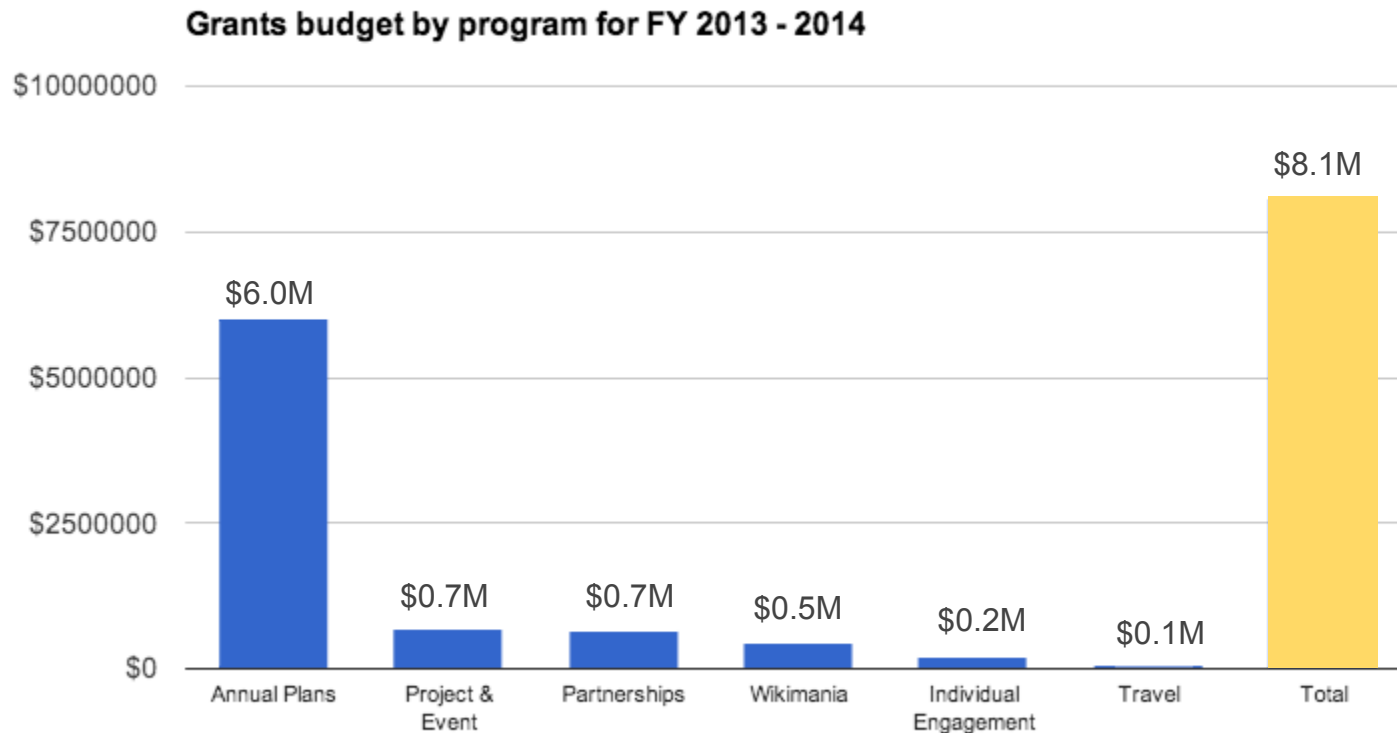
- Resources Needed and Questions
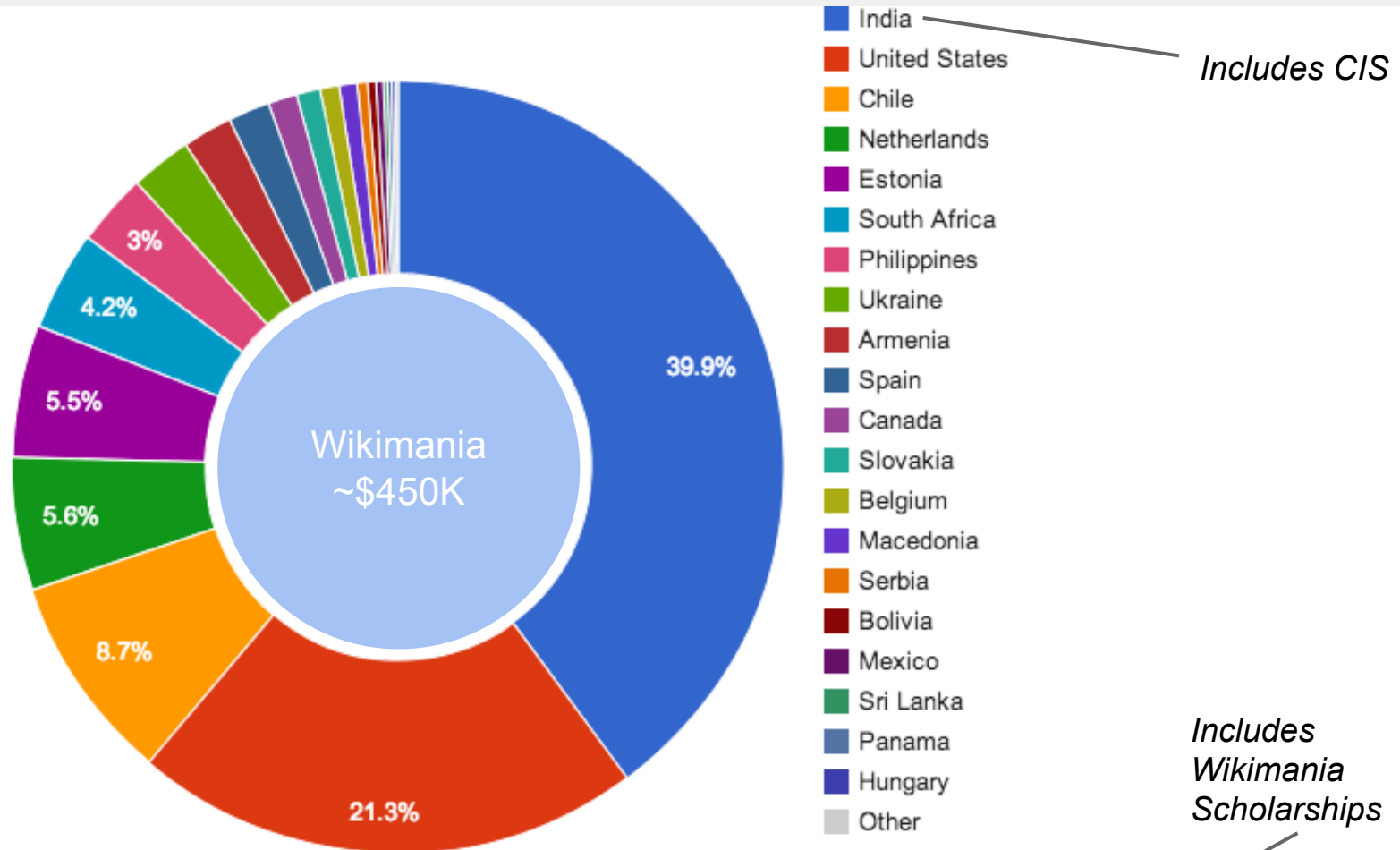
The story so far...

- Establishing structures, systems and processes

- Growing clarity on the differences between the different grants programs and moving between them

- Engaging intensively with grantees and committee/community members across the spectrum (being supportive while asking tough questions)

- Sharing process outcomes: positive in many cases, but long-term impact?

The grantmaking "envelope" for FY2013-14 is over $8M, including Wikimania and Partnerships

Grants budget by program for FY 2013 - 2014

Program	Amount
Annual Plans	$6.0M
Project & Event	$0.7M
Partnerships	$0.7M
Wikimania	$0.5M
Individual Engagement	$0.2M
Travel	$0.1M
Total	$8.1M

In Q1, we gave ~$1.2M in grants, or about 14% of the budget

Includes CIS

Legend:
- India
- United States
- Chile
- Netherlands
- Estonia
- South Africa
- Philippines
- Ukraine
- Armenia
- Spain
- Canada
- Slovakia
- Belgium
- Macedonia
- Serbia
- Bolivia
- Mexico
- Sri Lanka
- Panama
- Hungary
- Other

Pie chart values: 39.9%, 21.3%, 8.7%, 5.6%, 5.5%, 4.2%, 3%; center: Wikimania ~$450K

Includes Wikimania Scholarships

55% Global South *(Annual Goal: 10%)*

0.2% Gender Gap *(Annual Goal: 1%)*

13.5% Individuals *(Annual Goal: 7%)*

6

Overarching, continuing conversations for grantmaking strategy

- **Movement roles**: Board approach and implications for us, the new ED and strategic planning process

- **Global South/Being Global**: integration (across the organisation) and advocacy (by the key stakeholders) + specific Grantmaking GS strategy

- **Theory of Change**: based on strategic planning process, strategic goals/priorities from the Board that will help hone our grantmaking ToC

- **WMF as a role model**: learning and evaluation, reporting, communication, consultation, organizational growth, finances...

Annual Plan Grants / FDC:
Requests are growing an average of 42% in Round 1

	Entity	CUR	Request (local currency)	Request (USD)	Growth % mvmt resources
1	Amical	EUR	99,650	$134,726	321%
2	India	INR	1,1054,802	$175,400	526%
3	Serbia	EUR	88,343	$119,438	102%
4	Argentina	USD	196,451	$196,451	34%
5	CH	CHF	500,000	$551,565	38%
6	Deutschland	EUR	1,800,000	$2,430,582	31%
7	Israel	ILS	1,553,837	$436,224	183%
8	Nederland	EUR	323,000	$436,693	20%
9	Sverige	SEK	2,800,000	$435,036	19%
10	Österreich	EUR	230,000	$310,958	35%
11	UK	GBP	442,217	$713,544	33%

Total requested in Round 1: **$5.9 million**
Total available 2013-2014: $6.0 million
proposals we expect in Round 2: 4 to 8

Note: New entities are currently confirming
their growth in movement resources

Annual Plans / FDC:
Top three things we are learning

- Impact measurement takes time, but we see improvement in self-assessment and learning.

- Entities and WMF/FDC staff are having meaningful conversations about growth and appropriate grantmaking streams.

- Non-chapter community members have not engaged (much in community review; even cross-chapter review is low.

Project & Event Grants:
By the Numbers

$400K
Q1 Spend

$700K
Budget
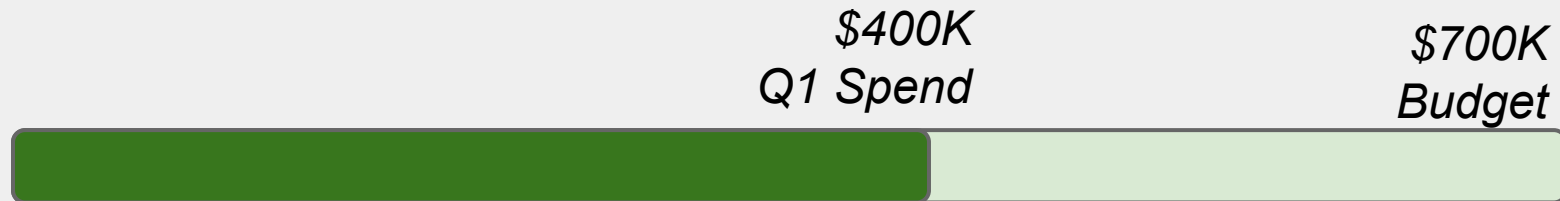
- some unusually large grants were given so far this year:
  - Wiki Education Foundation - ~$150K
  - WMCL annual plan - ~$60K
  - WLM Int'l team - ~$38K
  - WMEE annual plan - ~$38K
  - WMIN Q2-Q4 plan - ~$25K
  - WMZA WLM 2013 - ~$29K
  - WMZA OSF matching - ~$24K
- the spending is expected to be significantly slower in Q2-Q4

Note: Grant "spend" is based on when the amount was pledged / awarded, not when the funds were actually disbursed (which is dependent on paperwork, compliance gaps, etc.)

Project & Event Grants:
Top three lessons learned [1/3]

- There is a distinct move in grant proposals from general outreach and community events **toward content-acquisition projects**. WLM is the majority, but other projects (e.g. [WMUA's Kolessa digitization project](#)) as well.
  - Is it just because it's **easier to show results** in photography, because syntax/policy barrier doesn't exist?
  - Is it because WLM has built **a strong framework**, timelines, materials, and was actively and systematically promoted among communities (not just chapters!) by the int'l team?
  - **Can we replicate** the WLM *project and promotion* model to other initiatives, e.g. quality drives?
  - Is there a balance to aspire to between **content acquisition vs. content integration, curation, and generation** (e.g. articles written/improved around photos, categorization, label translation), or are the two categories to be considered strictly separately?

Project & Event Grants:
Top three lessons learned [2/3]

- Even experienced grantees are **not reading** our written resources/communications.
  - Changes in applicant/grantee proposals and attitudes happen when/after they have **conversations with staff**, either in person or by technological mediation.
  - capacity question: how much can/should we invest in human interaction vs. improving/changing our written communication?
  - e.g. decisions about applying to PEG vs. APG; improvements to proposal design

Project & Event Grants:
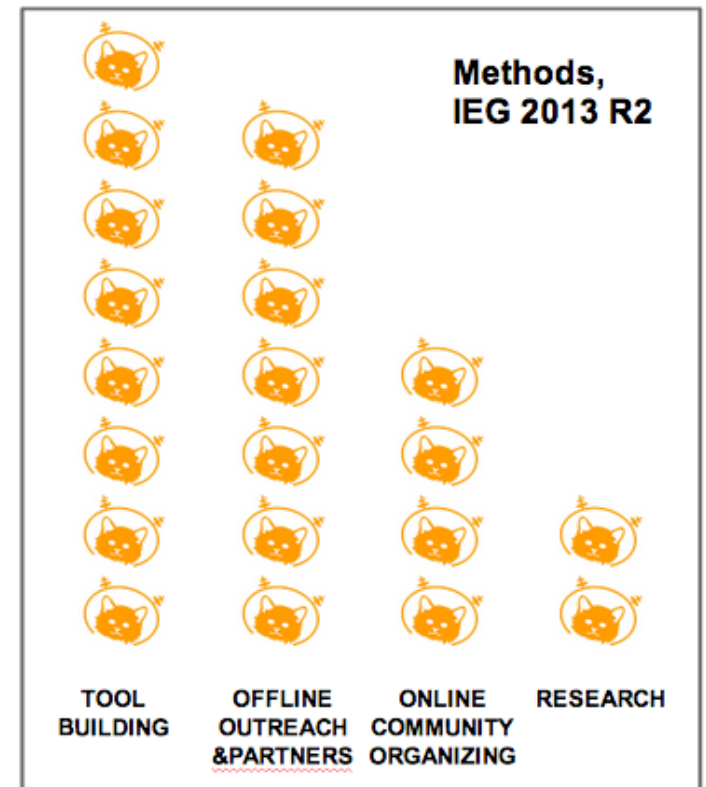# Top three lessons learned [3/3]

- Recognizing and managing **conflict of interest** (non-disclosure of CoI, self-dealing) is a recurring challenge among grantee organizations.
  - On several occasions, Grantmaking staff has had to point out [potential] CoI to grantees; in some cases, it was quite difficult to convince grantees the CoI (or potential CoI) was there.
  - We plan to develop some training materials about CoI in time for WMCON in Berlin.

Individual Engagement Grants:
21 proposals for Round 2

IEG FUNDING REQUESTS, 2013 R2

Amount in US Dollars

Methods,
IEG 2013 R2

TOOL BUILDING | OFFLINE OUTREACH &PARTNERS | ONLINE COMMUNITY ORGANIZING | RESEARCH
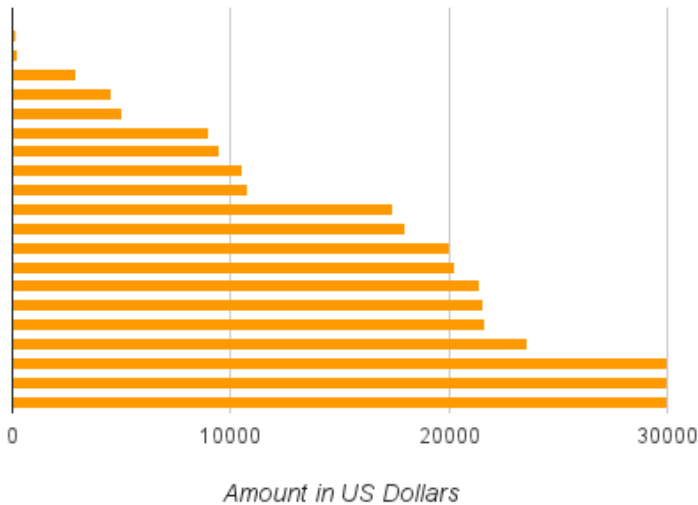
R1: 8 grants for $58,850. Final reports & impact assessment in Q2.
R2: 21 proposals for $306,575. 15 grants or $150,000 in projects selected in Q2.

Individual Engagement Grants:
Top three lessons learned

1. **Non-monetary support is important to individual grantees.**

Grantees report having supportive structure of planning/reporting/mentorship, recognition as a grantee is as or more useful than the money.[1]

2. **Community incubation improves quality, publicizing opportunities to individuals is still hard.**

The round 2 pool hasn't grown in size, but round 2 proposals appear to be slightly better quality.

About ⅓ of proposals were incubated in IdeaLab this round.

An early indicator of the importance this space?

3. **Editors want to be involved**.

10 out of 18 committee members are not chapter-affiliated or serving in other off-wiki movement roles

[1] http://blog.wikimedia.org/2013/08/01/ieg-learnings-call-new-proposals/

Travel and Participation Grants:
By the Numbers

Quarter 1, FY 2013-14	
Number of requests	13
# funded	9
# withdrawn	1
% of requested amount funded	54%
Median grant size	$564
Average grant size	$620
Range of grant sizes	$237 - $1,260
Total amount funded	$5,583
Funding partners	WMF, WMDE, WMCH

Travel and Participation Grants:
Top lessons learned

A full program analysis is underway, complete results to be published in Q2

How easy was it to find the info you needed on PSP pages?

How did you find out about the Participation Support Program?
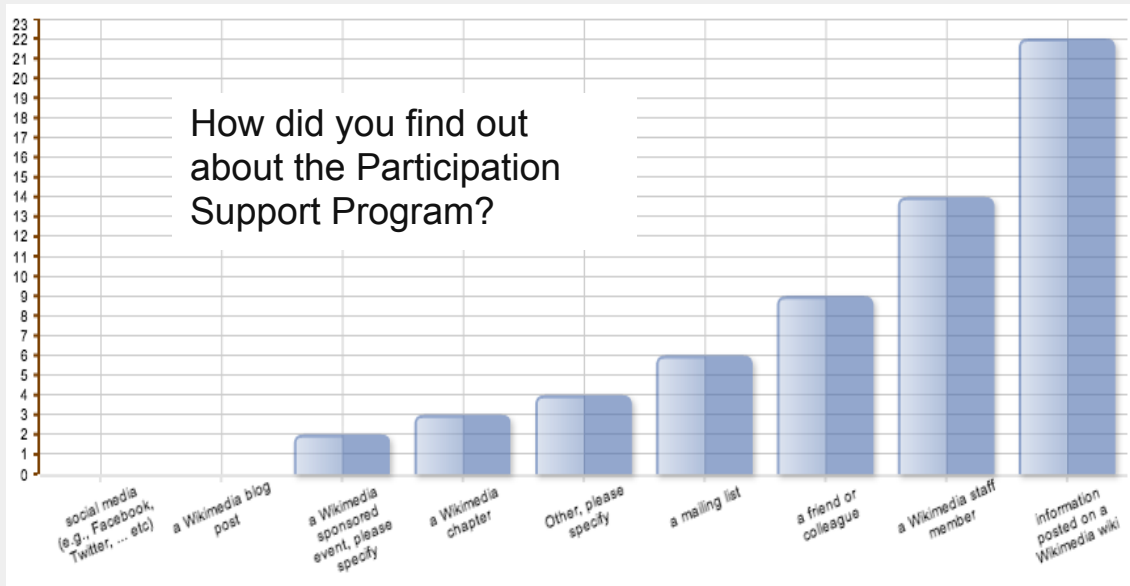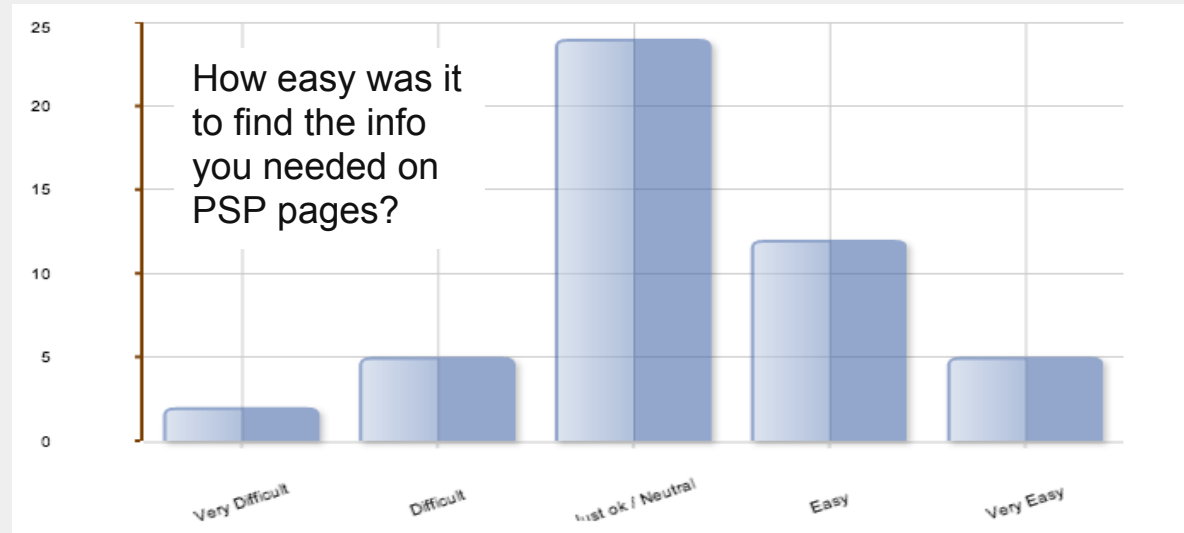
Overall high satisfaction (85%), but there is room to improve in **program page design** and **publicizing/expanding** the program.
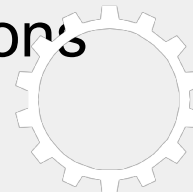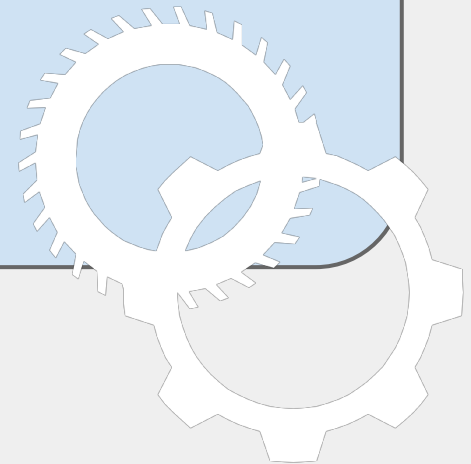
Agenda

- Q1 Grantmaking Overview

- Evaluation & Learning Strategy
  - High-level overview
  - Internal Evaluation
  - Needs Assessment
  - Gaps
  - Learnings
  - Current & Future plans

- Resources Needed and Questions

Evaluation and Learning – the high-level view

1

*What's the big picture
of where we are?*

Evaluation and Learning – the high-level view

Note: this a building metaphor, not a realistic picture of where we are

Evaluation and Learning – the high-level view

CONCEPTS

Most grantees and program leaders don't yet understand how evaluation is essential and empowering

SKILLS

Most volunteers only have a very basic understanding of organizational & program design (incl. evaluation)

TRUST

Some people in our movement still have fears when it comes to grantmaking and program evaluation

Evaluation and Learning – the high-level view

However, we're also seeing some positive signs

- we've raised awareness around learning and evaluation: people talk about it

- community members and chapters staff are eager to learn

- people started to embrace the infrastructure that we've built: Wikimetrics and portal on Meta

Evaluation and Learning – the high-level view

2

Imagine a world…

Evaluation and Learning – the high-level view

" *… where people, programs and organizations supported by grants create significant impact for the movement* "

Evaluation and Learning – the high-level view

Which requires

- a culture of shared learning, innovation and experimentation

- a solid understanding of how to plan and execute programs that have impact

- courage to stop things that aren't working and the capability to further improve things that are working

Evaluation and Learning – the high-level view

3

How our teams work together

Evaluation and Learning – the high-level view

Evaluation and Learning – the high-level view

Joint events

Evaluation and Learning – the high-level view

Joint events

FDC support

Evaluation and Learning – the high-level view

Joint events

FDC support

Infrastructure building

Evaluation and Learning – the high-level view
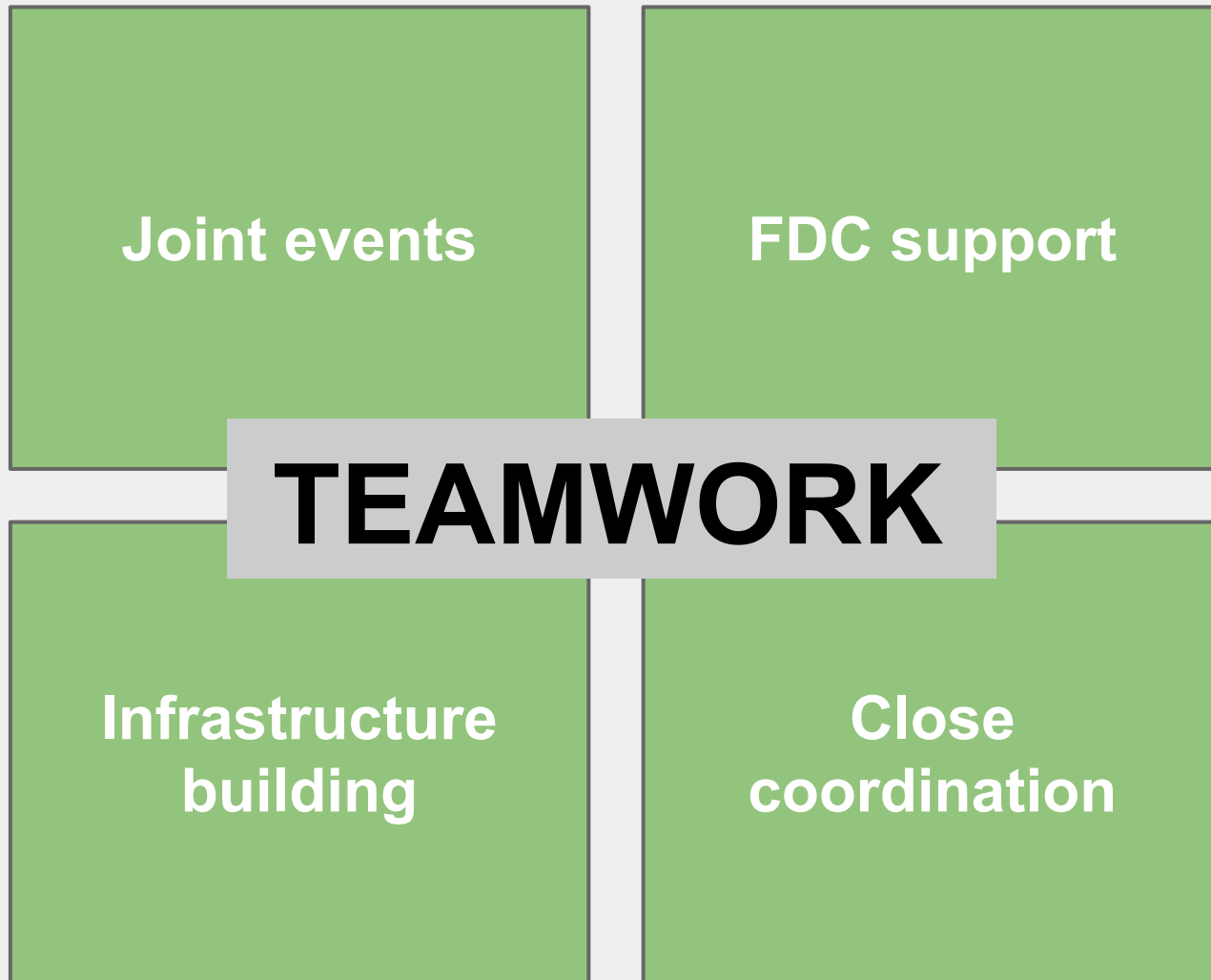
Joint events	**FDC support**
Infrastructure building	**Close coordination**

Evaluation and Learning – the high-level view

|	
Joint events	**FDC support**
Infrastructure building	**Close coordination**

TEAMWORK

The Grantmaking Learning & Evaluation team exists to help support the work of grantmaking

Grantmaking Learning & Evaluation Objectives

- Assist the grants program officers in executing their programs effectively and efficiently by providing frameworks, tools, and research.
- Provide a hub of learning and evaluation materials for our grantee partners.
- Execute and reflectively apply research and evaluation work to inform WMF's overall grantmaking strategy.
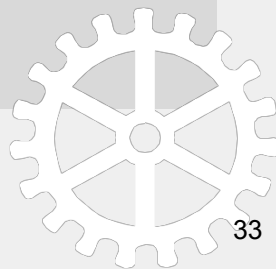
The Grantmaking L&E team revolves around answering the grantmaking team's key questions

Organizational effectiveness and models
- What are the characteristics of a "successful" Wikimedia organization?
- What are good models for online movements in the offline world?

Systems for learning and evaluation
- What reporting requirements encourage learning, without detracting from other work?
- How can we facilitate cross-sharing and learning?

Community mapping and baselines
- What is the current state of the projects in the global south? What are the trends?
- Who are the most "influential" users on different projects?

Internal processes
- How effective and efficient are our grantmaking programs?
- How fair and transparent are our grantmaking programs?

Note: See Meta for more examples on tasks
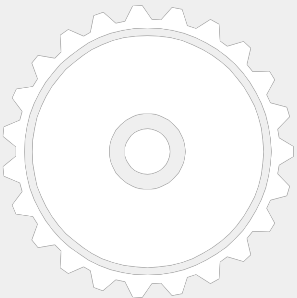
In addition to internal evaluation, the Grantmaking L&E team partners with the Program Evaluation & Design team for broader, movement learning

Grantmaking Learning & Evaluation

Program Evaluation & Design
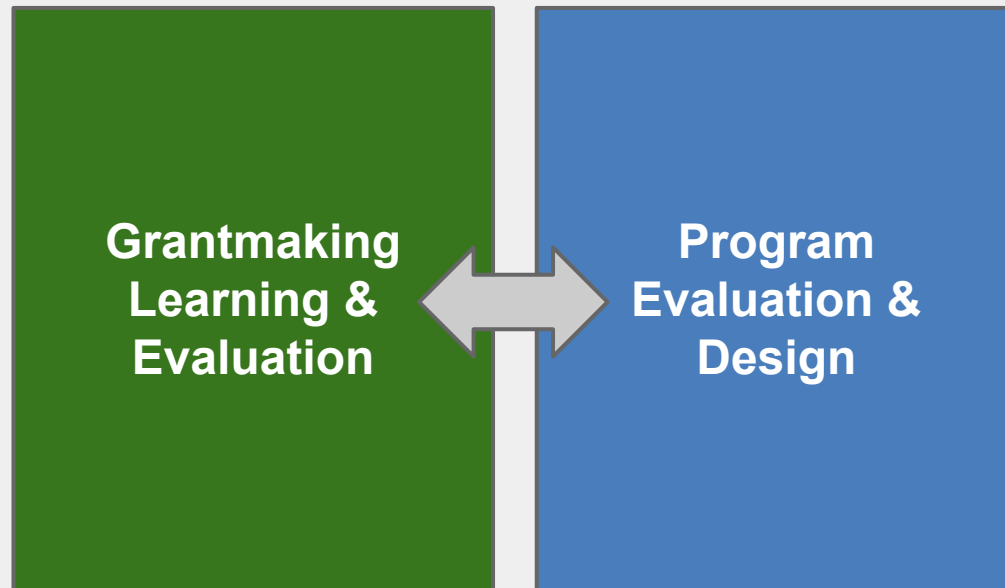
Our teams have spent the last two quarters doing a needs assessment and building resources enabling learning and evaluation

1	2	3	4
Mapping of needs and baseline data	**Gaps**	**Learnings**	**Current and future plans**
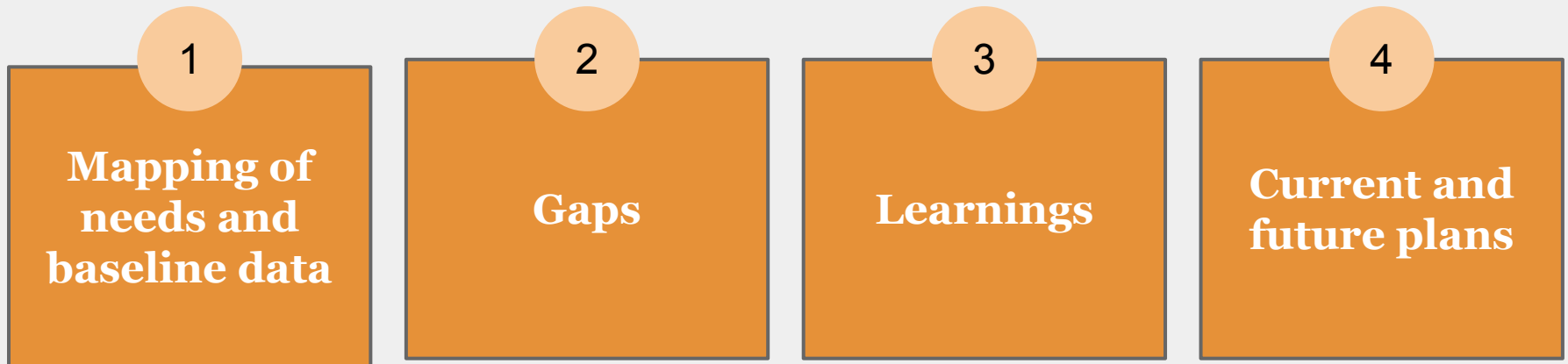
Three main principles guide the current evaluation initiative
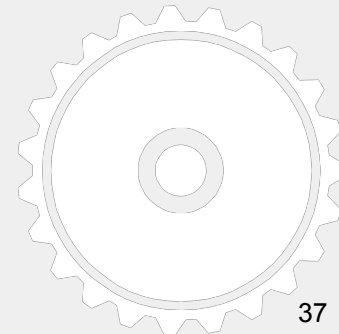
Facilitating self-evaluation:
Leaders will evaluate their own programs and organizations.

Fostering collaboration:
We are all in this together, and we will learn together.

Building capacity:
The goal is to equip movement leaders in the movement with the necessary skills to use program evaluation and design practices effectively.

Over the last months, we have been doing a needs assessment to direct our evaluation work

Document Review

- Proposals
- Reports
- Public budgets and plans

Face-to-Face Events

- Program Evaluation Workshop *(Budapest)*
- Learning Day *(Hong Kong)*

Surveys

- Pre-Post Evaluation Surveys from Budapest Workshop
- Online Exit Survey from Learning Day
- Capability Status Survey

Online Forums

- Meta:Programs *(now Evaluation portal/Parlor)*
- Facebook Group
- IRC
- Google Hangouts

Document Review

We analyzed and observed data on movement organizations

Grant proposals	Grant reports	Public budgets and plans

Landscape report

1. Reviewed reports and chapters pages for mapping of reports of programs that took place 2012 and early 2013.
2. Reports were reviewed along a set of categories of information shared as well as for gaps in reporting.

https://office.wikimedia. org/wiki/Program_Evaluation/Landscape_report

Organizational database

1. Reviewed reports and proposals to create database of the 41 chapters & thematic orgs.
2. Tracks staff, budgets, and grant spend over time. Anticipated use for movement roles conversations, to better understand the spread of chapters.

Face-to-Face Events

We held events to build community around and capacity for evaluation

Pilot Program Evaluation and Design Workshop
Goal: What is Evaluation, Why do we do it; Shared language of program evaluation, Logic Modeling

Pilot group meet-up *(Wikimania)*
Goal: Wiki Metrics, Community involvement strategies

Grantee Learning Day *(Post-Wikimania)*
Goal: How to communicate learnings; Understanding points of view

Surveys

We conducted surveys to assess interests and capabilities in evaluation

Event Participant Surveys

Pre-Post Survey from Pilot Workshop

Goal:Event feedback; learning progressions, support needs

17-19 participants responded

Online Exit Survey from Learning Day

Goal: Event feedback; future learning needs/interests

29 participants responded

Program Leader Evaluation Capability Status Survey

Goal: Evaluability Assessment

69 participants responded

1 2 3 4

Surveys

We have a first understanding of the evaluation capabilities for a majority of our known program leaders

27 Wikimedia chapters *(2 in negotiations)*	5 other organizations (clubs, user group, THORG)	11 individuals	50% of participants had received grant funding

Surveys
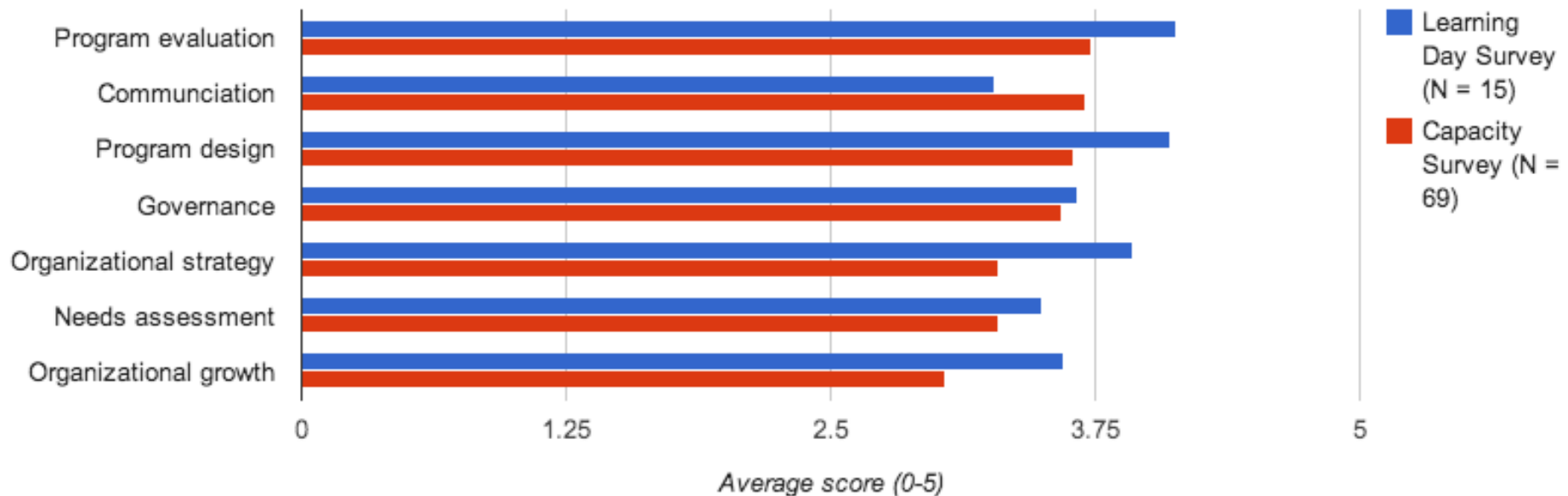
We also have a good idea about what some community members are interested in learning

Q: What topics would you be most interested in seeing addressed in future Learning events (whether in person or online sessions)?

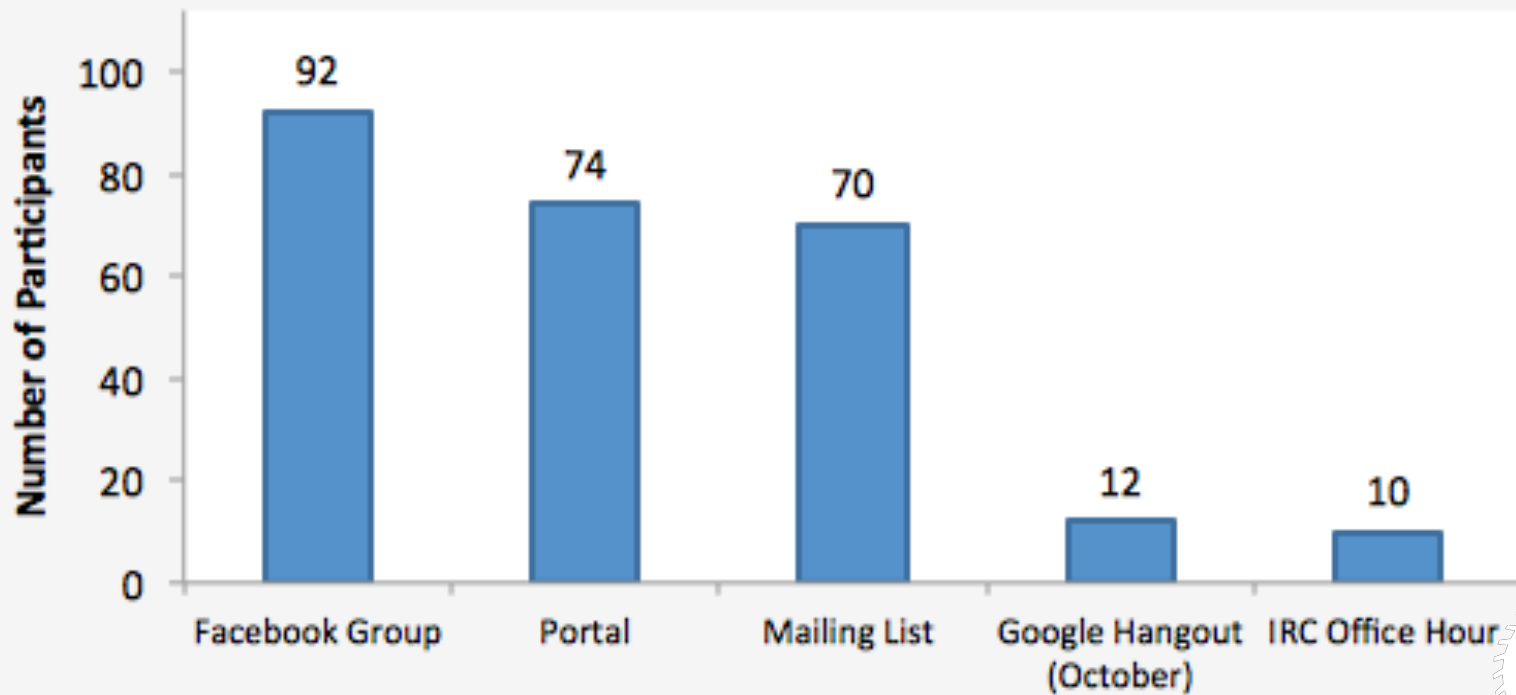**Areas respondents are most interested in learning**

Average score (0-5)

Legend:
- Learning Day Survey (N = 15)
- Capacity Survey (N = 69)

Categories: Program evaluation, Communciation, Program design, Governance, Organizational strategy, Needs assessment, Organizational growth

Online forums

A significant number of program leaders have joined the conversations on evaluation and learning

Participation by Online Avenue

Bar chart titled "Participation by Online Avenue" showing Number of Participants:
- Facebook Group: 92
- Portal: 74
- Mailing List: 70
- Google Hangout (October): 12
- IRC Office Hour: 10

Several <u>gaps</u> in our movement capacities emerged through the assessments

1	Organizational development and design
2	Evaluation and program design knowledge
3	Communication and partnership facilitation
4	Information resources

We are concentrating our work to focus on addressing these identified gaps.

① Gaps in Organizational Development and Design

Gap components	Evidence / Notes
Needs assessment and strategic planning	● **Communication:** often unclear (in grant applications) as to why organizations choose their particular sets of programs ● **Theory of change**: TOC is not evident nor articulated; lack of integrated program design within an organization or community
Models of organizing	● **Movement roles**: often, a clear strategy does not exist for organizing in a specific model (e.g., chapter vs. user group) ● **Lack of research:** no evidence how other online movements organize
Governance and leadership	● **Conflict of interest:** lack of understanding around and violations of CoI (actual, potential, perceived) ● **Board composition**: lack of clarity around execution vs. governance and the transitions between them ● **Transparency:** many chapters are still not reporting monthly, or annually.
Budgets and growth	● **High rates of growth**: ~25% of organizations are seeking >30% annual growth rates ● **Uneven resource distribution:** 58% of funds went to 3 chapters in 2012-13, and 19 chapters received no funding (did not ask) ● **Increasing interest in staff:** much desire to shift to a staffing model locally, though no clear strategies have been outlined
Time and expertise	● **Different interests:** program executors are at times more interested in executing different programs than evaluating, and have little time ● **Capacity:** 33% of survey respondents did not yet have a plan for how they would support their evaluation efforts (*Source: capability status survey*)

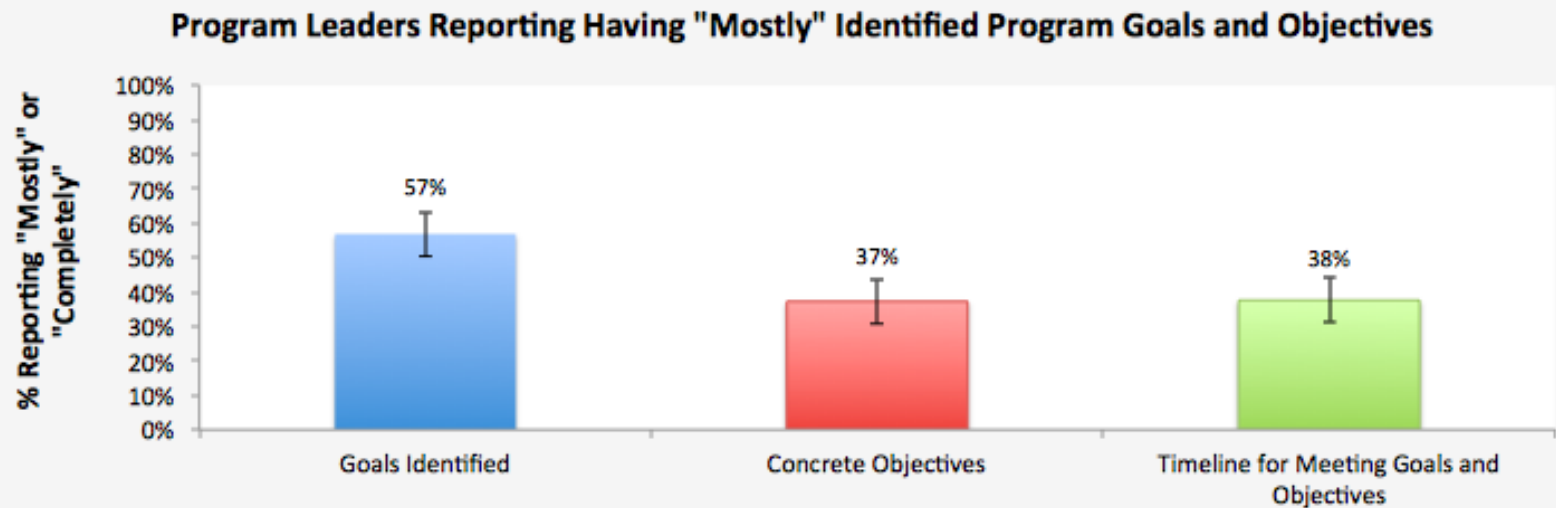# ① Gaps in Organizational Development and Design

Distribution of resources across chapters last year was quite large, without clear links to impact

	# entities	Total Amount	Average amount	Median Amount	Min amount	Max amount	% of total chapter grant spend
FY 2012-13: Movement Resources via the WMF Grants Process to Chapters							
Large Orgs: $500,000+ in movement funds	3	$2,945,336	$981,779	$619,000	$536,336	$1,790,000	58%
Medium Orgs: $100,000-499,000 in movement funds	9	$1,922,614	$213,624	$146,854	$101,018	$362,000	38%
Smaller Orgs: $1-99,000 in movement funds	9	$175,392	$19,488	$13,225	$1,427	$67,477	3%
Did not seek / receive funding	19						
TOTAL	**40**	**$5,043,343**	**$126,084**	**$120,000**	**$1,427**	**$1,790,000**	**100%**

② Gaps in Evaluation and Program Design Knowledge

Inconsistent/unclear theory of change for programs and organizations

- **Lack of clear goals and objectives**

Program Leaders Reporting Having "Mostly" Identified Program Goals and Objectives

% Reporting "Mostly" or "Completely"

- Goals Identified: 57%
- Concrete Objectives: 37%
- Timeline for Meeting Goals and Objectives: 38%

- **Inconsistent or absent examination of associated outputs and outcomes**
  The majority of reporting is on implementation rather than direct products or outcomes of the program

- **Identification of several goals and lack of prioritization**
  Average of 9 "Priority Goals" indicated for any given program

2 Gaps in Evaluation and Program Design Knowledge

Program leaders are eager to learn and move forward but need more training and support

How prepared do you feel you are to begin implementing program evaluation in terms of:	"Mostly" or "Completely"
Documenting your programming activities and event(s)	50%
Articulating your program strategy and goals	43%
Tracking and Monitoring accomplishments directly associated with your programming event(s)	43%
Measuring the effect or impact of your program after your program event(s) are completed	29%

3 Gaps in Communication and Partnership Facilitation

There is a need for expanded perception of evaluation ownership and awareness of the vast variety of goals and targets across similar programs

- **When reports are submitted they often only refer to programming outputs, sometimes direct products including content added or improved, but not any impact information.** (Document review and Landscape report findings)

- **Vast array of targeted goals of similar programs which may or may not be valid for each of the programs (i.e., Editing Workshops and Edit-a-thons and goals of recruitment vs. retention). (**Findings from Logic Modeling sessions and reporting of program goals)

- **Fears may leading to withholding learning related to challenges and/or failure. (**Findings from Document Review, Pilot Workshop dialogues, IRC Office Hour, and Learning Day dialogues)

4 Gaps in Informational Resources

| Participants identified **Tools** as top-rated support need | There are difficulties collecting data and disseminating learnings |

Top rated evaluation support needs
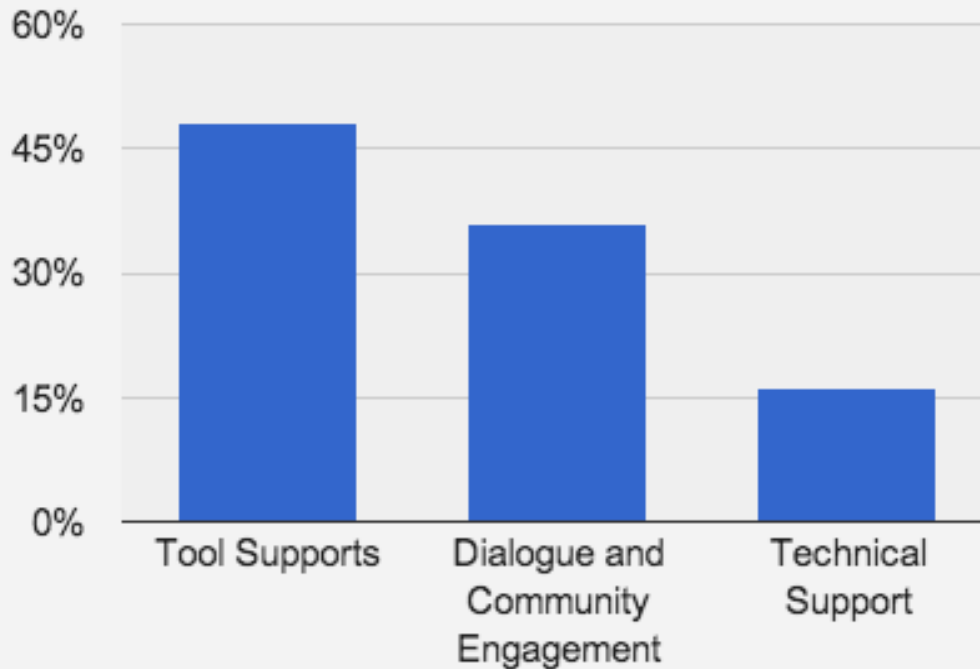
- **Tools** – *difficult to surface the information we need*

- **Datasets** – *not tracking the information we need (geo-data)*

- **Reports** – *not adequately collecting the information we need*

Source: Program Evaluation Workshop post-survey

<u>Learnings</u>: A few common traits emerged throughout our studies

- The biggest fears expressed are that evaluation and learning will be **too generalized** (i.e., not take into account the local contexts) and also will **reduce the work to "WMF-imposed" metrics**, rather than metrics of local importance

- **Time** is constantly cited as the biggest barrier to evaluation as a movement

- **Skepticism** around the amount and purpose of requirements from the Foundation

- Organization and program leaders are **able to learn** evaluation skills

- Organization and program leaders have a **great interest in** learning evaluation skills

- Most potential evaluators are interested in contributing to the conversation of evaluation, but by-in-large open to **specific and explicit direction** on what to evaluate and how

<u>Learnings</u>: We have already learned a lot from pilot projects

Face-to-Face helps develop trust and understanding.

Training appears to be working!

**Proposals and reports** for grants are changing.

<u>Learnings</u>: Face-to-face communication encourages trust and also enables training

> *"It takes a lot of time to understand each other roles and motivation. (we did [at the Learning Day], and it felt awesome. We should make experiments like this be spread to all the chapters members, and others.)"*
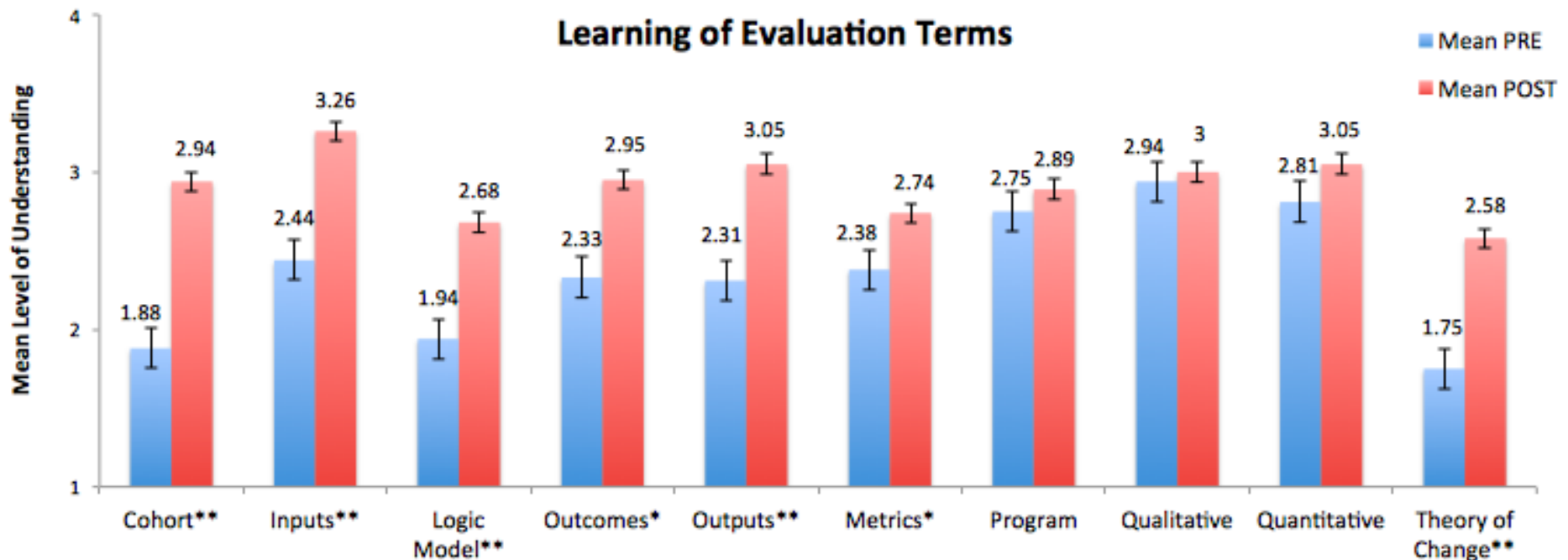>
> *– Grantee, post-Learning Day*

Source: CC BY-SA 2.5, Mike Peel, Wikimedia Commons
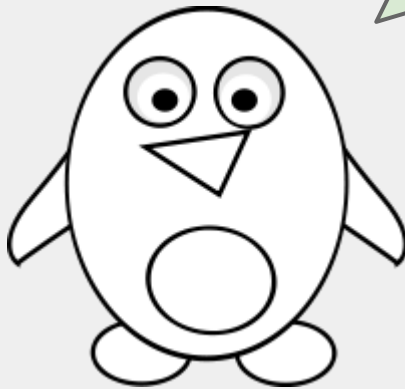
<u>Learnings</u>: In addition, the training provided appears to be effective

For example, participants in the Budapest workshop did a pre and post survey; by the end of the workshop, the majority left with a significantly improved understanding of most key terms.

Learning of Evaluation Terms

- Mean PRE
- Mean POST

Term	Mean PRE	Mean POST
Cohort**	1.88	2.94
Inputs**	2.44	3.26
Logic Model**	1.94	2.68
Outcomes*	2.33	2.95
Outputs**	2.31	3.05
Metrics*	2.38	2.74
Program	2.75	2.89
Qualitative	2.94	3
Quantitative	2.81	3.05
Theory of Change**	1.75	2.58

Note: For Ratings of Level of Understanding 1 = None; 2 = Basic; 3 = Applied; 4 = Expert

<u>Learnings</u>: Reports are improving, and individuals are using the tools provided

Community members are using the tools for which training is provided

- Individuals are using the "Logic Model" tool to build out the components of their programs *(see appendix for model)*

- Over 100 individuals using Wikimetrics evaluation tool

- Annual Plan Grants 2013–2014 Round 1 proposals demonstrate greater understanding of program design and impact

Improved quarterly reports for Annual Plan Grants in Q2 2013

*"We thank all entities for the quality of these Q2 reports, **which has improved**. Entities implemented the suggestions of FDC staff by clarifying financial tables in these reports, including more and more detailed metrics in program updates and reporting in a way more aligned with their proposal forms."*

Staff Summary, Progress Report Forms Q2

The impact on growing community and content via programs and organizations is still unknown
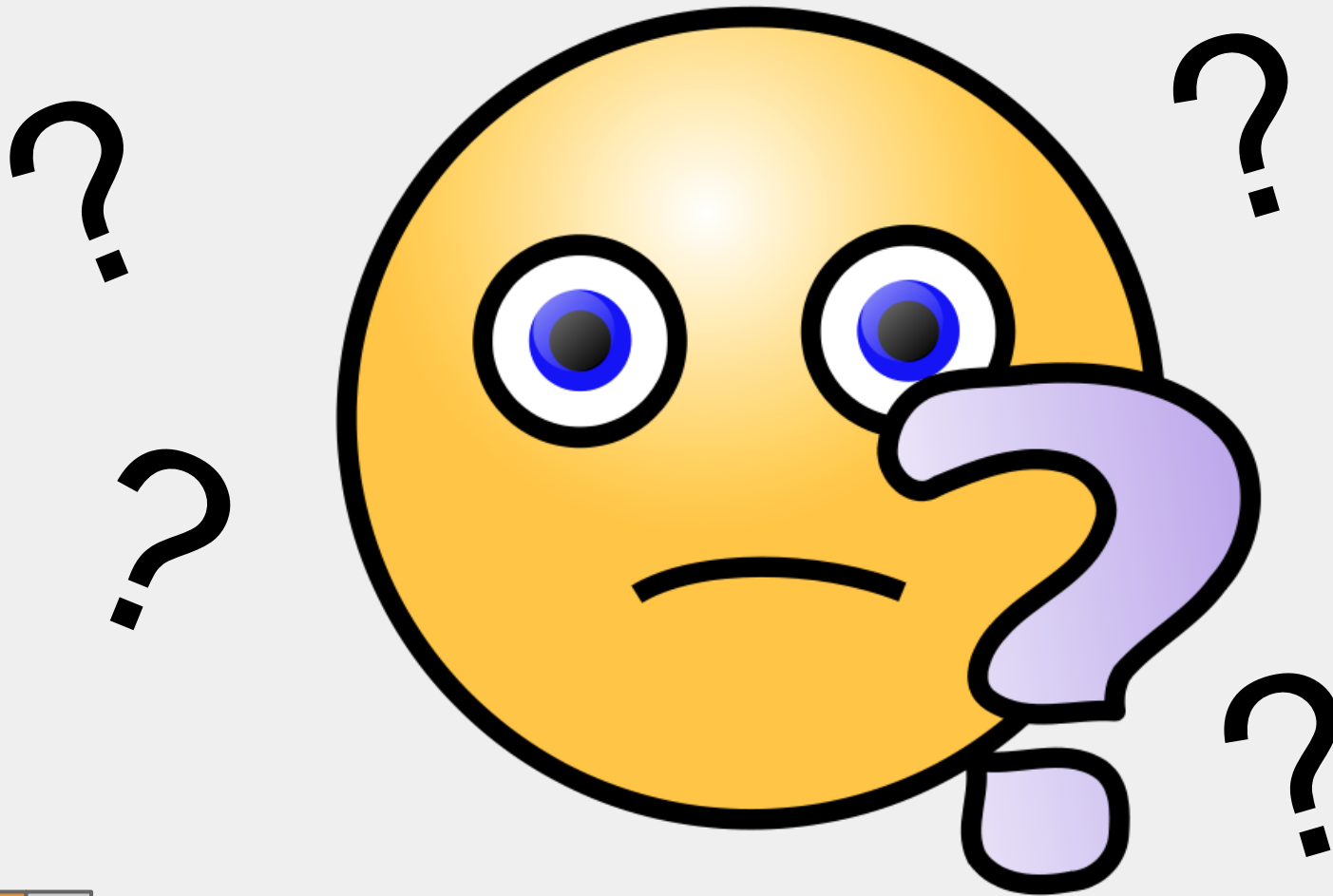
Our evaluation and learning plans stem from the needs we have seen demonstrated

1 Building movement capacity for evaluation

2 Leading the development of tools and systems for learning and evaluation

3 Surfacing relevant research and learnings to the community

Capacity building: Building the Knowledge Base through in-person and online avenues

Less scalable   *More scalable*

In-person Training Events	Online Training Events	Online Training Modules
Leveraging existing, community-initiated events	*Short sessions on specific topics*	*Written trainings going in depth, with translations possible*

- Invited to **IberoConf** to introduce theory of evaluation, specific tools, and what WMF wants to see

- Invited to facilitate **Boards Training** workshop

- Suggesting workshop items for **Wikimedia Conference**

- Second Grantee Learning Day at Wikimania

- Scheduling topics based on vocalized interest and demonstrated gaps

- Example past topics:
    - Program Evaluation Overview
    - Wiki Metrics
    - Evaluation Updates and Q&A and support
    - FDC Q&A

- Recorded for future reference

- Prioritizing based on needs
- Modules planned next:
    - Evaluation Models
    - Survey Design
    - Evaluation Basics
    - Data Sources
- Existing modules
    - Wiki Metrics
    - Logic Model Template
    - Appreciative Inquiry Overview

Capacity building - Engaging community through blogs and other online discussions
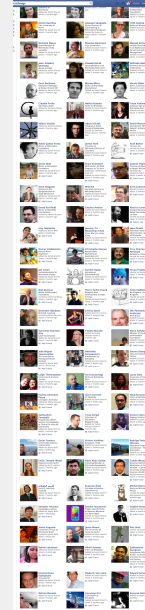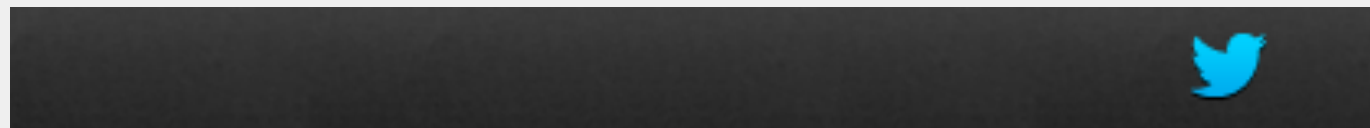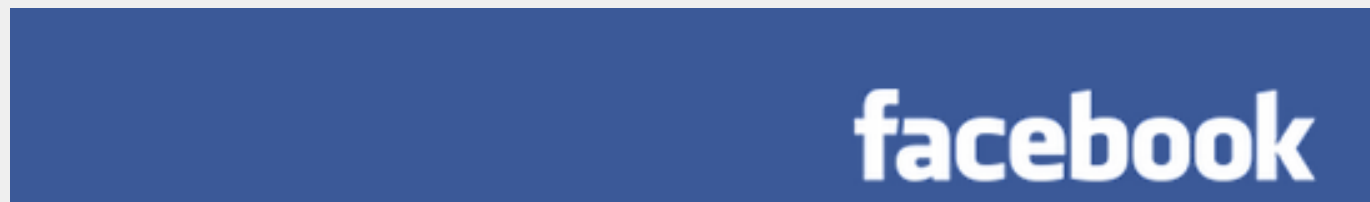
Developing tools and collection mechanisms

Tools for evaluation are a top need for program/org leaders

Wiki Metrics

(Thanks, Analytics team!!!)

qualtrics.com®

Since grant reports are required, these should be better leveraged to collect needed info and serve grantee needs

- Coordinating between Program Evaluation and Grantmaking to refine grantee reports to solicit information helpful for their evaluation (*to minimize need for extra solicitations*)

- Exploring more creative ways of allowing grantees to report, so that reporting is of maximum usefulness for them
  ○ IEG allows for blogs, etc. in lieu of traditional reports
  ○ Learning patterns can be incorporated into reports (more to come!)

- Paying attention to issues of language and translation in proposal and report questions [continues to be a work in progress]

Communicating and surfacing learning

Evaluation portal

A space to build community around evaluation

- Connect grantees with high quality, relevant resources

- Communicate WMF evaluation teams' roles and goals in an engaging and accessible way

- Encourage collaborative problem solving and knowledge sharing through Q&A, outreach, case studies, training modules, and *learning patterns*

https://meta.wikimedia.org/wiki/Programs:Evaluation_portal

Communicating and surfacing learning

Learning patterns

A new way to capture key learnings

- Based on design patterns:
  succinct solutions to recurring problems

- Easy to create, browse, apply,
  & translate

- A safe way to discuss failure

- Flexible & scalable: can help G&P
  develop better recommendations   and
  requirements

- *Not* an additional reporting requirement

Other patterns: *Photographic evidence,
Cookies by the exit, Short reports go a long way*

a **learning** pattern *i* for: surveys

Asking the right
questions

Problem:
*You need to make sure that you don't
accidentally leave important questions out
of your survey.*

Solution: *Use different types of survey
questions to ask for different kinds of
information. To make sure you cover all of
your bases, frame your survey around three
or four types of question: background
questions, activity questions, experience
questions, and opinion questions.'*

endorsed by: J-Mo

• ...

endorse this pattern

Create
a new pattern

Browse
more patterns

Visit
the portal

https://meta.wikimedia.org/wiki/Programs:Evaluation_portal/Library/Learning_patterns

Specific Themes of Learning and Evaluation

Grantmaking Learning & Evaluation

Program Evaluation & Design

- Organizational Effectiveness
  - Leadership and governance
  - Financial management and fundraising capacities
  - Organizational learning and evaluation systems
  - Partnerships with allied institutions
- Organizational design and models

- Identifying models and promising programs
- Guiding evaluation and reporting
- Building evaluation capacity
- Building program design capacity
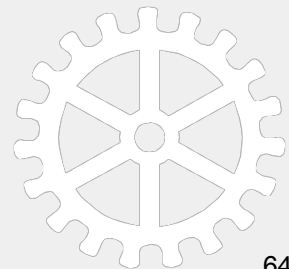
Blockers for the Learning & Evaluation work

Constraints on internal capacity (skills, time, ability to mentor)

Language! Translations are needed for our materials; people need to be able to share in their languages

Limited searchable information - especially at the organizational level (e.g., at the country-wide level)

Program leader fears and *gaining entrée* and participation from some major players

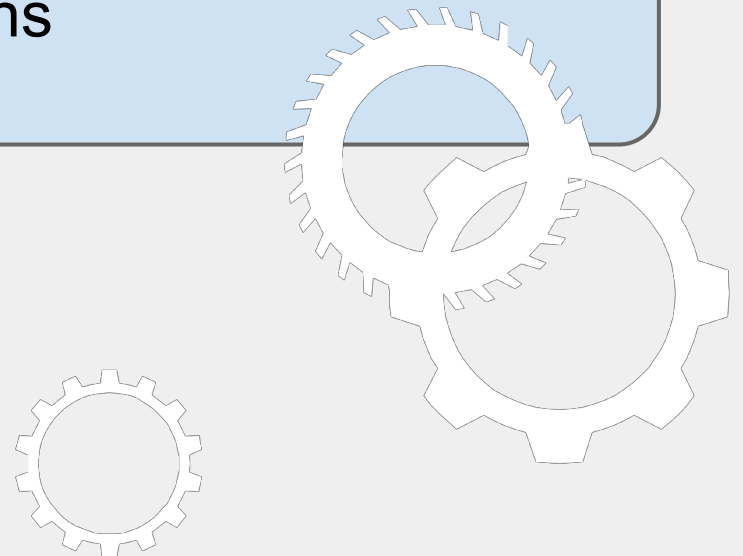Inability to track users online (via extensions) and directly link to assessment tools

The next steps
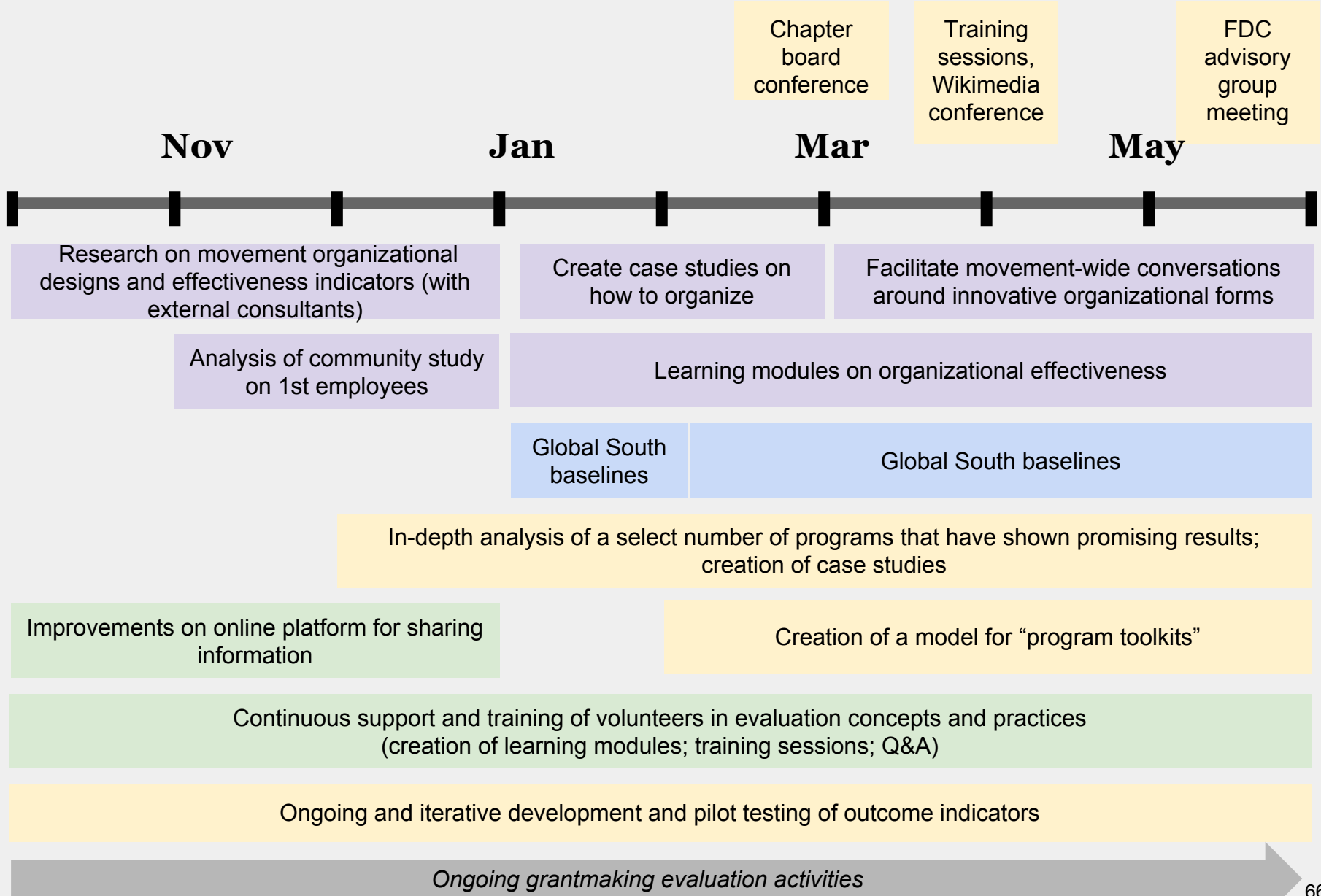
Agenda

- Q1 Grantmaking Overview

- Evaluation & Learning Strategy

- Resources Needed and Questions

Some L&E challenges … and the help we need!

Challenge	Description and request for help outside our teams
Evaluation for WMF and the movement is complex and multi-layered	- Global WM movement; WMF as a grantmaker; grantees; individual volunteers carrying out programs - Shared recognition of designs and capacities for these different needs, understandings and motivation levels for L&E
Volunteers find it difficult to access data needed to assess their work	- Data is scattered, no clear way of aggregation - Better centralisation of data sources and data surfacing tools are needed for the community in order to excel in self-evaluation (e.g., user friendly database which could easily be "queried").
Evaluation and visualization tools don't enable us to move the data from end to end	Ability to move the data from end to end: i.e., tools like Wikimetrics easily able to link to on-wiki extensions that collect usernames and also give final output that can be plugged into grantmaking results. Visualization software would be really helpful.
Other Wikimedia organizations are (appropriately) turning the spotlight onto WMF to serve as an exemplar	- Internal goal setting improvements needed - Rigor in tracking and evaluating WMF programs to strategy - More rigor in public reports, demonstrating best practices

Key learning and evaluation questions for discussion

- How do we support needs that are not yet clearly defined in our scope but that obviously affect our internal and external performance (e.g., project management, chapter/community health, governance, capacity building around strategy and design)?

- How do we better align with engineering to make sure we are building out products and services that are supportive of our global community activities? (e.g. we have strong requests for geo-based information from our grantees, but this data was just declared to be "insecure"; what information can we surface to geo-based program leaders?)

- How might a more competitive grants process affect willingness to share information openly (whether learning points or specific data, and particularly related to 'failures' or 'challenges') ?

Appendix

See: https://docs.google.com/a/wikimedia.org/presentation/d/1yecin9xLK7vFCE-cvEcgZYftm11vfPSPgqj41Kf9v78/edit#slide=id.g11d3c38d5_1_102